eTMF Features and Access Levels_v10.5

eTMF FEATURES AND ACCESS LEVELS

Reader	Basic access rights; view-only access to files. These users can only submit documents to a room via email if email is enabled in the room.
Editor	Medium access rights; has the ability to add documents directly to the room, apply metadata to documents, and perform workflow functions.
Manager	Managers have access to most room data, both in the documents view and the settings panel, without providing these users access to change permissions or invite new users to the room. Room configuration permissions can be configured.
Administrator	Highest access rights; rights to all documents, settings, and user access control.
*	Functions which are available to that level of access if the appropriate action of **Document Manager** is awarded

FEATURES	Reader	Editor	Manager	Admin
Audit Manager		X	X	X
Audit Responder		X	X	X
Auditor Role: Perform Document Audits	X	X	X	X
Auditor Role: Send Audit Queries	X	X	X	X
Compare Documents	X	X	X	X
Confirming or Correcting Auto-Predicted Doc Type		X	X	X
Contact Service Desk Via E-mail	X	X	X	X
Country & Investigative Site Folder View	X	X	X	X
CRA Reconciliation Module: Check documents as Reconciled (CRAs only)	X	X		
CRA Reconciliation Module: Create General Query	X	X	X	X
CRA Reconciliation Module: Run Reports	X	X	X	X
Dashboard Dashlets: Arrangement	X	X	X	X
Dashboard Dashlets: Configure title, height, columns	X	X	X	X
Dashboard Dashlets: Manage Access, Disable and make Mandatory				X
Dashboard: Add documents via eTMF Health dashlet		X	X	X
Dashboard: Manage Expiring/ Expired Documents		X	X	X
Dashboard: Create Manual Placeholders via eTMF Health dashlet	X	X	X	X
Dashboard: Edit contents within "About this Room" dashlet			X	X
Dashboard: Edit contents within Bulletin Board dashlet			X	X
Dashboard: Edit Project Links dashlet		X	X	X
Dashboard: Manage your tasks and view all tasks in Task Dashlet	X	X	X	X
Default Module Selection on a Per-Room Basis	X	X	X	X
Document: Add a document through Document dropdown		X	X	X
Document: Add documents to Submission Package through Document Cart		X	X	X

FEATURES	Reader	Editor	Manager	Admin
Document: Add a document via the Upload dashlet		X	X	X
Document: Add private notes through My Comments	X	X	X	X
Document: Auto-Indexing	X	X	X	X
Document: Bulk Import Documents		X	X	X
Document: Compare Documents through Document Cart	X	X	X	X
Document: Configure Document Grid	X	X	X	X
Document: Copy document link with right-click	X	X	X	X
Document: Download	X	X	X	X
Document: Edit Metadata		X	X	X
Document: Email document to anyone with access to room	X	X	X	X
Document: Flexible Viewing Options for Documents using Layout Function	X	X	X	X
Document: Initiate Optical Character Recognition		X	X	X
Document: Relate Documents through Documents Cart		X	X	X
Document: Mark as Favorite	X	X	X	X
Document: Mark Documents as Popular through Documents Cart		X	X	X
Document: Mass Coding		X	X	X
Document: Merge Documents through Documents Cart		X	X	X
Document: Change Custom date format in My Profile	X	X	X	X
Document: Metadata: Drag and drop documents to eTMF folders to auto-encode metadata		X	X	X
Document: Metadata: Edit metadata on a final document		X*	X	X
Document: Metadata: Type in Date		X	X	X
Document: Move Documents to Start-up		X	X	X
Document: Print	X	X	X	X
Document: Pin Views in "View by Pane"	X	X	X	X
Document: Rearrange Data Columns in Document Grid	X	X	X	X
Document: Replace Document with New Version		X	X	X
Document: Right-Click to Add Document		X	X	X
Document: View from Dashboard	X	X	X	X
Document: View Metadata	X	X	X	X
Document: Update 'Auto-Generated Name' at a document type level			X	X
Email Messages to Room Users		X	X	X
Email Documents to Room Inbox	X	X	X	X

FEATURES	Reader	Editor	Manager	Admin
Email: Convert communication sent out of system into a document for eTMF		X	X	X
e-Signature: Sign a document	X	X	X	X
e-Signature: Initiate an e-signature		X	X	X
e-Signature: Enable in study room				X
eTMF Completeness View of Documents and Placeholders	X	X	X	X
eTMF Completeness: Ability to Create General Queries on Placeholders	X	X	X	X
eTMF Completeness: Ability to mark Placeholders as Non-Applicable		X	X	X
eTMF: Sort TMF folders using different filters	X	X	X	X
eTMF: View Sites and Site Contacts if enabled	X	X	X	X
Export: Audit Metadata	X	X	X	X
Export: Document Metadata	X	X	X	X
Export: Document Versions	X	X	X	X
Export: Documents	X	X	X	X
General: Flexible pop-up window resizing and repositioning	X	X	X	X
General: Multi-Factor Authentication	X	X	X	X
General: Switch between rooms without accessing Home Screen	X	X	X	X
Homepage: Navigate to documents within the eTMF from the Expired Docs List	X	X	X	X
Homepage: View Cross Study Activity & Expired Docs	X	X	X	X
Import: Documents		X	X	X
Import: Metadata		X	X	X
Manage Audit Settings				X
Manage Dashboard Setup				X
Manage Document Types			X	X
Manage E-mail Settings & Templates			X	X
Manage FAQ Settings			X	X
Manage Forms Settings			X	X
Manage Index Outlines			X	X
Manage Q&A Settings / Subject Matters			X	X
Manage Required Documents			X	X
Manage Room Settings			X	X
Manage Security Settings				X
Mass Coding		X	X	X

FEATURES	Reader	Editor	Manager	Admin
Event Manager: Access and View Event Progress	X	X	X	X
Event Manager- Add Events		X	X	X
Event Manager: Add Event Types		X	X	X
Event Manager: Edit Events & Event Types		X	X	X
Event Manager: Add Event Triggers				X
Q&A: Ability to convert Q&A to the FAQ			X	X
Q&A: Address user questions		X	X	X
Q&A: Assign Subject Matter Experts			X	X
Q&A: Initiate a question	X	X	X	X
Q&A: Read answers to all questions posed			X	X
Q&A: Read answers to personal questions posed	X	X	X	X
Quality Review Module: Create new Audit				X
Quality Review Module: Duplicate, Disable, Delete Audits				X
Quality Review : Export Pending documents	X	X	X	X
Quality Review : Query resolution feature	X	X	X	X
Queries Module: Export Queries	X	X	X	X
Queries Module: Bulk Reassign Queries		X	X	X
Relation Type: Add				X
Search: Advanced search function	X	X	X	X
Search: Enter multiple keywords	X	X	X	X
Search: Simple Search Function	X	X	X	X
Site profile: View and edit history	X	X	X	X
Sites Module: Add, edit, delete sites		X	X	X
Sites Module: Export Site Information	X	X	X	X
Tasks: Arrange and view list by category	X	X	X	X
Tasks: Assign to multiple room users		X	X	X
Tasks: Create tasks for yourself	X	X	X	X
Tasks: Export data from Task dashlet		X	X	X
Trial Communication: Inbox Access		X	X	X
Trial Communication: Outbox Access		X	X	X
User Guide Access	X	X	X	X
User Login: Account locks after configurable number of failed login attempts	X	X	X	X
User: Change "View By" pane	X	X	X	X
User: Change login password	X	X	X	X
User: Notification Preferences	X	X	X	X
Users: Change access				X
Users: Invite new users				X
Video Files: view MP4 format	X	X	X	X
View Investigative Sites by Country	X	X	X	X
View: Set a default	X	X	X	X

FEATURES	Reader	Editor	Manager	Admin
Workflow Management				X
Workflow Query Initiation		X	X	X
Workflow Query Resolution		X	X	X
Workflow: Assign status to documents		X	X	X
Workflow: Bulk edit document status			X	X
Workflow: Change document status and reassign reviewer			X	X
Workflow: Claim documents		X	X	X
Workflow: Queries may be viewed by recipient	X	X	X	X
Workflow: Release claimed documents		X	X	X